



LOS ANGELES UNIFIED SCHOOL DISTRICT REFERENCE GUIDE

TITLE: Targeting the Purchase of Textbooks, High Schools

NUMBER: REF-4117

ISSUER: Maria E. Wale, Assistant Superintendent
Professional Learning, Development & Leadership

DATE: February 11, 2008

PURPOSE: To provide ordering instructions and an explanation of appropriate expenditures for State textbook funding.

MAJOR CHANGES: This Reference Guide replaces REF-3541, Targeting the Purchase of Textbooks, High Schools, dated February 23, 2007, and contains updated District procedures and best practices for ordering textbooks to ensure textbook sufficiency.

INSTRUCTIONS: The following guidelines must be implemented:

ROUTING
Local District (LD)
Superintendents
LD Directors
LD Instructional Coordinators
LD Fiscal Services Managers
Principals

A. TARGETED AREAS FOR PURCHASE

In compliance with the mandates of *Williams* legislation, the District’s policy requires that each student, including English-language learners and those in special day classes, have a District-adopted textbook for use in the core and required subjects of reading-language arts, history-social science, mathematics, science, health, and foreign language. Students are to be assigned a single textbook in these subjects that they are to use both at home and in class. District policy does **not** allow the use of State textbook funding for the purchase of class sets in addition to the books issued directly to students.

Schools should have full sets of core and required textbooks for all students as all school reported 100% sufficiency on their *Williams* certifications for the October 9, 2007, hearing.

Textbooks may fall within one of three categories:

- District Adopted Textbooks
- Approved Textbooks
- Supplemental Textbooks

District Adopted Textbooks: District adopted textbooks are the textbooks in the core and required subject areas that have been adopted for use in the District for grades K-12. These are the **only** textbooks that may be purchased with State textbook funding. The list of District Adopted Textbooks is available at the Textbook Services website, <http://textbookservices.lausd.net>.

District Approved Textbooks: District approved textbooks are additional textbooks in the core and required subject areas that have been approved by the District’s instructional units for use in the District for grades K-12, but have not gone through the formal State or District adoption process. As such, these books comply with the mandates of *Williams* legislation; however, these books may **not** be purchased with State textbook funding. The list of District Approved Textbooks is also available at the Textbook Services website, <http://textbookservices.lausd.net>.



LOS ANGELES UNIFIED SCHOOL DISTRICT REFERENCE GUIDE

Supplemental Textbooks: Supplemental textbooks are used to enhance the core instructional program. These books may be purchased with categorical or discretionary funds.

In order to ensure sufficient textbooks for students, high schools are directed to target the expenditure of 2008-2009 State textbook funding for purchases of District **Adopted** textbooks only.

B. DETERMINING TEXTBOOK NEEDS

1. Inventory all textbooks to determine anticipated needs prior to attending the spring enrollment "Roadshow."
2. Remove obsolete and unused books and materials from classrooms and textbook room.
3. Review textbook inventory with Director of School Services at Roadshow.
4. Compare projected enrollment numbers and current inventory counts to target textbook purchases for the following school year.
5. Ensure that textbooks and instructional materials are ordered, to the extent practicable, before the school year begins as mandated in Education Code, Section 60252.
6. Immediately inventory and process books upon delivery. Complete the "online receiver" for both partial and complete orders.
7. Compare textbook inventory to Master Schedule two weeks prior to opening a semester or track to identify possible insufficiencies for specific courses. Review this inventory information with Local District personnel to ensure sufficiency and identify surpluses that can be shared with other schools.
8. Remedy identified insufficiencies prior to the beginning of instruction.

C. LIST OF AUTHORIZED INSTRUCTIONAL MATERIALS

The *List of Authorized Instructional Materials* has been replaced by three (3) lists: District Adopted Textbooks, District Approved Textbooks, and Supplemental Textbooks (see Section A for definitions). These lists can be accessed at the Textbook Services' website: <http://textbookservices.lausd.net>. The pages contained in the District Adopted Textbooks list may serve as attachments for the Book Purchase Order (BPO).

Schools must contact the publishers to obtain prices and shipping costs for adopted textbooks for which no price list order form is posted on Textbook Services website. Shipping costs are usually 9% or 10% and must be calculated on the subtotal and before the total. Shipping is taxed.

The Textbook Services website also provides a current list of publishers' information including publisher representatives' names and phone numbers. Whenever possible, schools should contact their local publishers' representatives to help them write their orders to ensure correct pricing and obtain the best possible gratis package.



LOS ANGELES UNIFIED SCHOOL DISTRICT REFERENCE GUIDE

D. PRICE LISTS AND ORDER FORMS

Price lists and order forms for foreign language, health, history/social science, DRWC/ELD, and mathematics are located on the Textbook Services webpage: <http://textbookservices.lausd.net> under Order Forms 9-12. See Section F for information on Mathematics adoption ordering.

Order forms are in Excel format. With the exception of the school information and quantity fields, the spreadsheet is locked. It will calculate prices including sales tax. It can be e-mailed from one site to another within the District. However, it should **not** be e-mailed to publishers. Publishers have been mandated by the District not to process orders unless they have a hard copy of the order with the principal's signature.

E. GRATIS ITEMS FOR NEW ADOPTIONS, NEW CLASSES AND/OR NEW SCHOOLS

Publishers are legally bound to provide the same gratis packages to everyone in the District, state, and the country. Publishers will provide the greatest number of free materials the first year of every adoption. However, if schools are implementing new classrooms or opening new schools, publishers will provide the first year gratis packages.

Free items must be *requested* on the BPO or the attachments otherwise the materials will not be shipped. Publishers are expected to provide the free items promised when schools place their original orders. In subsequent years of the adoption, publishers are not expected to provide free items, such as a teacher's edition, to schools. If support materials are lost, schools are expected to pay for replacements.

F. MATHEMATICS ADOPTION

Mathematics is being studied and is targeted for purchase this year. The current mathematics textbooks should be retained until the newly adopted textbooks are received.

Textbook Services will provide electronic order forms for mathematics textbooks in an Excel format that will compute totals and include the gratis package. These spreadsheets will be posted on the Textbook Services website: <http://textbookservices.lausd.net> once the Mathematics Textbook Evaluation Committees have made their recommendations and the Board of Education has adopted the textbooks.

G. TEXTBOOK ORDERING PROCEDURES

When placing BPO orders, Local Districts have agreed to implement the following best practices:

- All decisions for textbook ordering are coordinated by the Local District.
- Textbook funding remains at the Local District level.
- Local Districts will provide schools with a "Request for Textbooks" form that can be used for review, adjustments, and approval.



LOS ANGELES UNIFIED SCHOOL DISTRICT REFERENCE GUIDE

- Local Districts will invite publishers to the enrollment “RoadShow” and use their established procedures to help principals write textbook orders based on enrollment projections provided at the meeting.
- The Local District will process the signed and completed “Request for Textbooks” form.
- Local District personnel will review orders to ensure that the requested books are appropriate for purchasing with State textbook money.
- The “Request for Textbook” form will be submitted to the Local District fiscal services manager for the funding line information.
- Local District support staff will input the BPO orders.
- The BPO will be printed at the Local District Office.
- The Local District superintendent or designee will sign off on the BPO.
- The Local District Office will mail the BPO to the publisher.
- The Local District Office will maintain a spreadsheet listing of all orders placed.
- The Local District Office will forward a copy of the BPO to the school attached to a cover memo listing the orders included.
- The school location will receive the books and verify quantities.
- The school location will input the “online receiver” into IFS for both partial and complete orders.
- Local District support staff will monitor the delivery of all the Local Districts’ BPOs and the timely completion of the “online receiver” by the school site.
- All documents will be retained on file as reference for school and Local District Certification of Textbook Sufficiency (see Reference Guide No. REF-3539, February 12, 2007) in compliance with state textbook funding and *Williams* legislation requirements.

Potential benefits realized from these practices include central ordering control, accurate initial order input including gratis items, elimination of some non-essential purchases, and greater control over receipt verification, thus reducing back end payment issues.

H. DISPLAY

Textbook Services operates a permanent display of all state-adopted textbooks and instructional materials. The office is located at Adams Plaza, 1545 Wilshire Boulevard, Suite 200, Los Angeles, CA 90017, and is open from 8:00 a.m. to 4:30 p.m., Monday through Friday. For parking instructions, please call (213) 207-2280.



LOS ANGELES UNIFIED SCHOOL DISTRICT REFERENCE GUIDE

RELATED REDOURCES: BUL-2326.4, *Textbook Policies and School Site Procedures* dated June 8, 2007
REF-1376, *Procedures for Reporting Textbook Concerns*, dated October 25, 2004
REF-C-23, *Commodity Code Usage*, Business Services Division, dated May 9, 2003.

ASSISTANCE:

- For reading program information, call the Local District Literacy Coordinator.
- For English Language Development Program information, call the Local District English Learner Coordinator.
- For mathematics program information, call the Local District Mathematics Coordinator.
- For state price lists and order forms information, refer to Section C, call Textbook Services at (213) 207-2280, or refer to the Textbook Services website: <http://textbookservices.lausd.net>.
- For budget information, call the Local District fiscal services manager.
- For additional information about the BPO process, call Textbook Procurement Section at (562) 654-9308.



LOS ANGELES UNIFIED SCHOOL DISTRICT REFERENCE GUIDE

Instructional Support Services

REF-4117
February 11, 2008

ATTACHMENT A

BOOK PURCHASE ORDER (BPO) PROCESS FLOWCHART Targeted Textbook Purchases

ACTIVITY	Order Preparation	Order Entry	Order Monitoring	Delivery and Receiving
RESPONSIBLE FUNCTIONAL UNIT(S)	Schools and Local District (LD) Office	Schools or Local District (LD) Office	Textbook Procurement Services (TPSS) and Local District Staff	Schools and Local District
PROCESS	<p>LD adheres to centralized ordering</p> <p>Schools obtain accurate pricing from Price List and Order Forms available on the Textbook Services webpage</p> <p>Schools work with publishers to ensure orders are correctly written to include gratis items</p> <p>Schools work with LDs to ensure orders are completed and input correctly into IFS</p>	<p>BPO > \$1000</p> <p>For BPOs < \$1000, but > \$250, Principal to approve online & "SCHED" in IFS</p> <p>For BPOs > \$1000, LDs review & release before the BPO is "ACCP" in IFS*</p> <p>* LDs can enter BPOs for any amount greater than \$250 on behalf of their schools.</p>	<p>LD clerical support monitors delivery & helps resolve delivery delays*</p> <p>LDs assist schools by contacting publishers when BPO's approach 60 days ARO</p> <p>TPSS manages and distributes Opening Textbook Order Flag Reports* and BPO Aging spreadsheets.</p> <p>* The District requires publishers to deliver State-adopted textbooks within 60 days after Receipt of Order (ARO). * Green, yellow and red Flag Reports which indicate opening order placement are distributed to each Local District Superintendent and other instructional executives.</p>	<p>Publisher delivers order within 60 days</p> <p>School enters an "online" receiver into the IFS system</p> <p>LDs assist in resolving late deliveries*</p> <p>* In the event of an unusual delay causing a backorder, the 60 day requirement maybe extended by mutual agreement for order fulfillment.</p>
TIMELINE	Feb. 11 – Feb. 25, 2008	Feb. 26 – April 4, 2008	April 7 – May 30, 2008	May 15 – June 30, 2008